



Stenseth Samuelson & Boese, Ltd.

Where your numbers meet opportunities

Using your Online Tax Organizer

There are a number of advantages to using our online tax organizer. You can access it from anywhere and at any time. Your information is delivered to us securely without the wait of mailing or the hassle of coming to the office. And if you upload your original documents along with the organizer, your return will be processed more quickly since we don't have to spend time scanning paper documents.

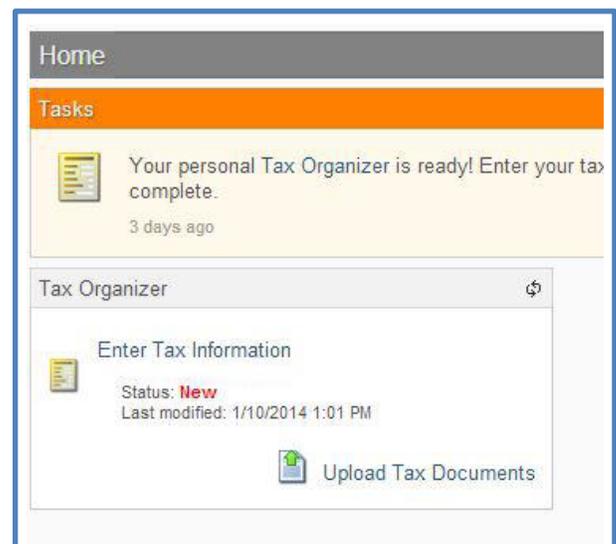
To take advantage of all these benefits, you'll need to **enter** your tax information, **sign** the engagement letter and **upload** your tax documents.

Enter your tax information:

If you are set up to receive an online organizer, you will receive an email that lets you know when it is ready for you to use. Once you have received this email, you can log into your account at www.woodburycpas.com and the link to your organizer should be listed on the home page.

To start working on your organizer, click on 'Enter Tax Information' and you will be brought to the data entry screen of the organizer. On the left-hand side of the screen are the different forms provided for your tax info. If you need a form that is not listed here, you can click on the 'add forms' button at the bottom of the screen and choose additional forms to add to your organizer.

Don't forget to fill out the **Questionnaire** page, this document must be filled out before we can complete your taxes. It covers different tax issues and ensures the accuracy of your return.



The **Notes** page can be used to include any info that does not fit into one of the forms or to ask any questions that you have while filling in the organizer.

Sign the Engagement Letter

The engagement letter explains the terms of our services and must be signed before we can prepare your taxes. It will be uploaded to your online account at the same time as your organizer, and can be found in the documents file by clicking on:

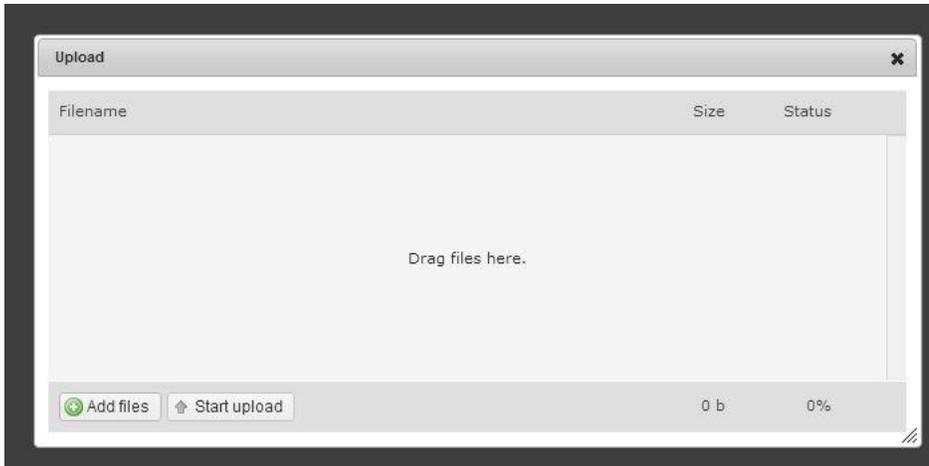
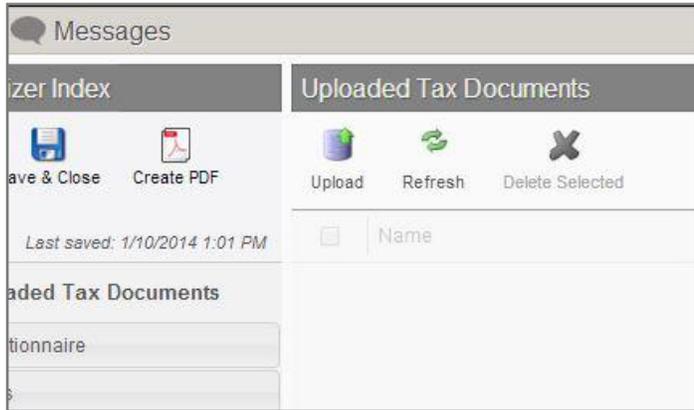
Your Name – Tax Returns — 12-31-15 -- Action Items.

You will need to print this page, sign it, and then either upload it as part of your organizer or bring the hard copy to our office.

Upload your tax documents

To upload documents as part of your organizer, open your organizer and select 'Uploaded Documents' on the upper left-hand side of the page. This will show you any documents that have already been uploaded to your organizer and you can use the 'upload' icon at the top of the page to add more documents to your organizer.

After you click on the upload icon, an upload dialog box will open up. You can either drag and drop files into the upload box or you can click on the 'add files' button to select files from your computer.



Send the Organizer to your Preparer

Once you have filled in your organizer and uploaded all of your documents you are ready to send the organizer to your preparer. Click on the orange button labeled 'send to preparer' on the left-hand side of the organizer page. Your preparer will be notified that your organizer has been submitted and they can begin working on your return.

Note: Once you send the organizer, you will not be able to make any changes to it or add any additional documents. If you find that you need to give us an additional document for your taxes you can use the 'File Exchange' function of your online account.

Come to the Office for a Tax Apt (Optional)

Whether you use the online organizer or not, you are welcome to make an apt with one of our staff to discuss your taxes and ask any questions that you may have. You can either bring your paper documents to the meeting, or if you have uploaded them with your organizer, your preparer will be able to pull them up on a monitor for both of you to see and discuss. We offer online options to make our services more convenient and to streamline the tax preparation process, but we are always willing to take the time to sit down with you over a hot drink and talk with you in person.